



Poland

## ESF project "Customer Relationship Management in National Revenue Administration"

### Key facts

#### SPECIFIC OBJECTIVE OF THE OPERATIONAL PROGRAMME

'Improving quality and monitor the provision of administrative services relevant for business'

#### TARGET GROUPS



Staff of 434 tax administration offices

#### BENEFICIARY ORGANISATION

Ministry of Finance – National Revenue Administration

#### PROJECT DURATION

30/09/2018 – 31/08/2021

#### COORDINATOR

Artur Gostomski, Dyrektor, Departament Kluczowych Podmiotów

 [artur.gostomski@mf.gov.pl](mailto:artur.gostomski@mf.gov.pl)

#### PARTNERS

Treasury Administration Chambers, National Treasury Information, Treasury Chambers, Customs Offices

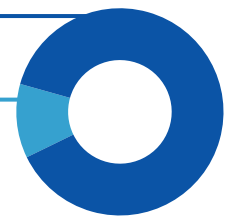
#### BUDGET

**EUR 1,900,000**

ESF contribution

**EUR 600,000**

National budget of the  
Republic of Poland  
contribution



#### PROJECT/ORGANISATION WEBSITE



<https://www.gov.pl/web/kas>

<https://www.gov.pl/web/kas/zarzadzanie-relacjami-klient-kas>



<http://bit.ly/2RzrnTq>

### Activities implemented

#### PROJECT IN NUMBERS

  
**1,302**

**Training  
participants**

  
**434**

**Tax administration units which implement the new customer relationship model and whose staff will improve their competence in managing customer relations**

#### MAIN PROJECT TASKS



Conducting in-depth research into the satisfaction, expectations, and behaviours of National Revenue Administration (NRA) customers.



Developing and making available a model for managing relations with NRA customers.



Conducting a feasibility study for an IT tool supporting research and management of relations with NRA customers.



Determining the requirements for and developing or purchasing an IT tool available on the market, including its possible adaptation to the NRA's organisational specificity, supporting research and management of NRA customer relations (CRM).



Conducting specialist training and workshops on managing relations with NRA customers.

## Project journey: from conception to delivery

### INITIAL STAGE

#### CONTEXT OF THE PROJECT

The project constitutes a response to the problem of **poor quality** of NRA customer service and is particularly important from the point of view of changes occurring in units subordinated to the Minister of Finance, i.e. **tax chambers and offices, customs chambers and offices, as well as fiscal control offices**. These units have been operating within the national revenue administration since 2017. Considering their previously different rules of procedure and management mechanisms, it was necessary to introduce standardised solutions in the area of **customer relationship management**.

#### PURPOSE OF THE PROJECT

The aim of the project is to enhance the quality of services provided by NRA.

#### MAIN CHALLENGES FACED, AND DIFFICULTIES ENCOUNTERED

The basic difficulty involves the issue of the **IT tool** aimed at handling the developed model of managing customer relations. One of the significant risks associated with project execution has to do with the issue of the **customer database**, since it constitutes the foundation for the system for managing customer relations. Another risk involves the functionality of the IT tools.

#### KEY DEVELOPMENTS AND EVENTS DURING THE IMPLEMENTATION PROCESS

- Creating a **model** for managing NRA customer relationships using the knowledge resulting from the existing relations of customers with NRA units;
- **Adapting activities** and services provided by NRA to customer needs as informed by satisfaction, expectations, and behaviour surveys of particular segments of NRA customers;
- **Improving the competences** of NRA staff in the field of customer relationship management.

#### KEY RESULTS AND SUCCESS FACTORS

Key results of the project include: the implementation of a coherent service system tailored to **customers' needs** throughout the NRA; increasing the level of **satisfaction** among NRA customers; **reducing the costs** of ensuring correct compliance with tax and customs obligations and improving the **effectiveness** NRA actions. Critical factors for the success of this project were: the experience of the project team; the universally shared belief that it is necessary to combat tax fraud; the Ministry of Finance's considerable potential for organisational learning; appropriately defined needs constituting the scope of activities in the analysed project; and finally, the support of the project management for activities undertaken within its framework.

### RESULTS, IMPACTS

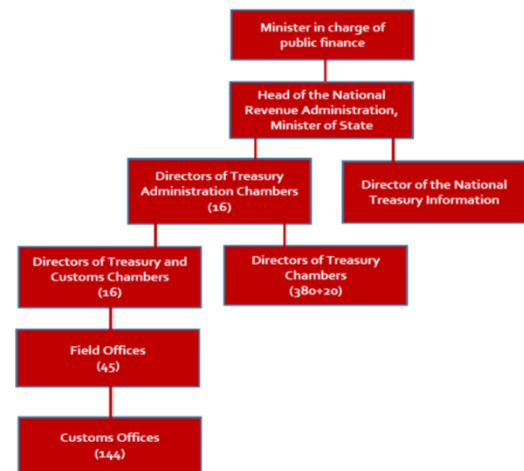
#### (EXPECTED) IMPACT ON THE ADMINISTRATIVE SYSTEM IN GENERAL

The project will significantly improve the quality of the process of providing administrative services which are essential for conducting economic activity. Secondly, the efficiency of customer relationship management in tax administration is improved.

#### LESSONS LEARNT: THE ROLE OF ESF FINANCIAL SUPPORT

Without ESF funding, the implementation of this project would be very difficult. Apart from the financial resources, equally important was the ability to utilise the achievements of projects pursued under the ESF framework in this project, including management, monitoring, and reporting procedures. As a result, the project proceeds smoothly and efficiently.

### REFLECTIONS



Structure of Poland's National Revenue Administration  
Source: National Revenue Administration

## Personal experiences



'National Revenue Administration serves not only for the tax collection but also to build citizens' trust to their State'

**Artur Gostomski**, Director, Department for Large Business, Ministry of Finance

'The achievements of National Tax Administration clearly show that a key action to making the public administration to work better are civil servants looking for more innovative approaches to the performance of the public tasks, strong organizational leadership and political support'

**Kamil Mroczka**, Director General, Polish Financial Supervision Authority

The study "Progress Assessment of the ESF Support to Public Administration" (PAPA) aims to present specific cases of ESF-funded public administration reform and capacity building initiatives. The contractor prepared 30 case studies and factsheets on ESF supported projects funded in 17 beneficiary countries of Thematic Objective 11 during the programming period 2014-2020.

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Find out more about the project by following the link <http://bit.ly/PAPA-PPMI> or scan the QR code using your smartphone camera.

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